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FOREIGN AGRICULTURE CIRCULAR

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FOREIGN MARKET NOTES--COTTON

Cotton Situation in Egypt 1/

By Francis H. Whitaker
Agricultural Economist

Egypt is expected to have a record cotton acreage in 1951. It is generally felt that, in spite of the Government's plans for increased planting of grain, the 1951 planting of cotton will be between 10 and 15 percent greater than the 2,050,000 acres seeded last year. The largest previous planting was in 1930 when about 2,160,000 acres were planted. Last year's plantings were the largest since 1937 when about 2,053,000 acres were seeded.

Cotton production control has been in effect in Egypt since 1941. In the past, control was effected by restricting the percentage of cropland which could be planted to cotton. In 1951, there will be no direct restriction on cotton planting, but specified percentages of cropland suitable for grain must be planted to grain. In the Northern Delta Zone of Lower Egypt 35 percent of the cropland must be planted to food grains; in other areas the requirement is 50 percent. Last year it was permissible to plant only 35 percent of the cropland in the Northern Delta to cotton, and in the other areas there were no restrictions. The Minister of Agriculture is empowered to modify the provisions where it is deemed expedient to do so. Control is exercised through Government distribution of planting seed and by the head men of the villages. Farmers are encouraged to follow a 3-year rotation system of cotton, clover, and grains.

If 2,255,000 acres are planted to cotton this year, a 10-percent increase over 1950, and the yield is equal to the recent 10-year average of 490 pounds of lint per acre, Egypt will have a crop of about 2,280,000 bales of 478 pounds in 1951-52. This would compare with 1,763,000 bales in 1949-50 and 1,702,000 bales which is the estimate for the crop year just closing. The largest production was in 1937 when about 2,241,000 bales were produced on approximately 2,053,000 acres. The less than average yield per acre last year of 397 pounds was caused by heavy insect damage and hot weather during the principal bolling period which caused unusual shedding.

1/ A preliminary report of a study of foreign market outlets and competition with United States cotton, conducted under the provisions of the Research and Marketing Act. Mr. Whitaker acknowledges the help given him by the staff of the American Embassy at Cairo.

Egyptians do not expect the world production of cotton this coming season to be sufficient to catch up with the world demand. The Egyptian cotton planting now being completed will reduce the grain acreage figure to the minimum.

The price that Egyptian cotton is bringing on the market is leading some Egyptians to believe it will be more economical to grow cotton and buy grains. An acre of cotton will produce on the average about 500 pounds of lint, which at today's prices would buy around 200 bushels of wheat. An acre planted to wheat will produce from 25 to 35 bushels. The acreage, yield, and production of cotton in Egypt for the past several years is shown in table 1.

The Cotton Congress was critical of plant breeders who were continually trying to bring out new cotton varieties. It was recommended that the breeders spend their time trying to improve and maintain the good character of the varieties already developed. It was pointed out that one of the difficulties in Egypt in recent years has been the market disturbance and inconvenience to spinners caused by the introduction of new Egyptian varieties. It was felt a steady increase in yield of a few old varieties would be of advantage to both the spinner and grower.

In 1951 the greatest increase in acreage will be in the medium staple varieties of Ashmouni seed. The International Cotton Congress, at its meeting in Cairo the latter part of February 1951, considered the world needs of cotton and passed the following resolution relating to the need for cotton of medium staple length (around 1 1/8 to 1 1/4 inches):

> "That this Congress holds a high opinion of medium staple cotton, which is particularly suitable for many purposes; Giza 47 and Giza 31, doubtless have certain desirable characteristics and are suitable for some purposes, but there will be a continuing demand for medium staple on a large scale. Importance should continue to be attached to increasing the yield of medium staple cotton and improving its basic properties."

In 1950, Ashmouni and Zagora made up 43 percent of the plantings, Giza 30 about 19 percent, and Karnak 35 percent. Most of the balance was Menoufi. These are the most important varieties, and they have predominated for the past 8 years. The trend in plantings by 10-year periods of the different varieties, segregated by staple lengths, is shown in table 2. The production by staple lengths over a period of years is shown in table 3. The acreage and production by varieties over a period of 5 years is shown in table 4.

Fear is expressed in Egypt by some that stocks of Egyptian cotton may be at dangerously low levels before the next crop comes in if complete freedom of exports is allowed to continue. Stocks of cotton reported in Egypt on August 1, 1950, are computed at 447,000 bales of 478 pounds of lint and, with 1,702,000 bales of production, gave a supply for the 1950-51 crop year of 2,149,000 bales which was the shortest supply in over 10 years. Exports and consumption for the period August 1, 1950 to March 1, 1951, total about 863,000 bales and 147,000 bales (478 pounds) respectively.

Stocks on August 1, 1949, were 563,000 bales; on August 1, 1948, 758,000 bales; and on August 1, 1947, 1,279,000 bales. On December 6, 1950, the Government stopped sales and requisitioned all existing stocks of their medium staple cotton. This was to assure the local mills of a continuing supply at a fixed price. Investigation disclosed that the mills required some 107,000 bales in addition to their on-hand stocks until the next crop is available. The Government obtained some 62,000 bales by requisition and the Cotton Brokers Association guaranteed to supply the balance. Restrictions were lifted on January 3, 1951. The Egyptian cotton supply balance sheet for recent years is shown in table 5.

In recent years the major importers of Egyptian cotton, in order of importance, were the United Kingdom, India, France, Italy, Germany, and the United States. These countries have been taking close to 70 percent of the exports. The total quantities of Egyptian cotton exported during the past few years by countries of destination are shown on table 6. The exports shown in this table are based upon the Egyptian export records. They may not agree with the records of the various importing countries since sometimes the cotton is diverted en route, and often it is stored in free ports for a considerable time before it enters a country. The entry date may be in a different crop year. Cotton is never considered imported until it clears the customs of the receiving country.

The varieties of Egyptian cotton which enjoy the greatest foreign demand are Ashmouni and Karnak. The Egyptians report Ashmouni has a staple of from 1 1/8 to 1 1/4 inches, while Karnak runs 1 1/2 inches and over. Of the varieties, Giza 23 and Menoufi have a staple length similar to Karnak, while Zagora has a staple length like Ashmouni. Giza 7 and Giza 20 have a staple length between Ashmouni and Karnak or between 1 1/4 and 1 1/2 inches. The volume of exports by varieties for recent years is shown in table 7.

There has been a sharp rise in the price for Egyptian cotton since the United States Cotton Export Controls went into effect (September 8, 1950). The price of Ashmouni cotton on the Alexandria market for the month of August 1950 averaged about 41.5 cents per pound, while Karnak averaged 47.7 cents per pound. In addition, there was an export tax of 2.96 cents per pound.

For the month of September 1950, the Alexandria prices for these two varieties averaged about 48.2 and 56.1 cents per pound, respectively. To these prices must be added an export tax of 5.91 cents per pound. The increase in export tax was effective on September 1, 1950.

The prices of these two varieties went up steadily until about the middle of March 1951. However, on January 7, 1951, the Egyptian export tax on cotton was again increased. It went from 5.91 cents per pound to 10.41 cents per pound.

In October 1950 Ashmouni averaged about 63.8 and Karnak 66.0 cents per pound (tax excluded). On March 1, 1951, Ashmouni was about 83.3 and Karnak 102.9 cents per pound, and on March 14 they were 81.1 and 108.2 cents per pound. Soon after this the market declined, and the prices on March 22, 1951, were 70.3 for Ashmouni and 98.4 cents per pound for Karnak.

When the International Cotton Congress met in Egypt in February and early March 1951, it was very critical of the export tax law, and a committee was appointed to work with the Egyptian Government to see what could be done about it. In response to the committee's representation on the cotton export tax, the following statement by the Minister of Finance was read at the final session of the conference:

> "(a) That in accordance with the suggestion made by some spinners, the Minister is willing to organize the registration of genuine sales of raw cotton for export. (b) He does not intend to increase the tax until the machinery for the official registration of such contracts has been instituted. (c) Severe penalties will be inforced for false statements. (d) That after the official registration of genuine sales for export, should any further increase of the export tax be instituted, he would see to the non-application of this increase in tax to contracts registered before the date of the new increase."

Table 1. - Egypt: Acreage, Yield, and production of cotton, 1930-31, 1937-38, and 1941-42 through 1950-51 1/

Season	Acreage	Yield	Production
	1,000 acres	Pounds lint	1,000 bales 2/
1930-31	2,162	379	1,715
1937-38	2,053	522	2,241
1941-42	1,706	476	1,700
1942-43	733	561	860
1943-44	740	468	724
1944-45	885	505	935
1945-46	1,020	497	1,059
1946-47	1,258	466	1,227
1947-48	1,302	475	1,295
1948-49	1,496	578	1,810
1949-50	1,756	480	1,763
1950-51	2,050	397	1/ 1,702

1/ Estimate.

2/ Bales of 478 pounds.

Source: Ministry of Agriculture, Egypt.

Table 2. - Egypt: Cotton acreage by variety, in acres and as percentage of total, 1910, 1920, 1930, 1940, and 1950

Variety	1910		1920		1930		1940		1950	
Long Staple, over 1 12/32"	Acres	Percent	Acres	Percent	Acres	Percent	Acres	Percent	Acres	Percent
Maarad	-		-		68,618	3	86,148	5	-	
Sakha 4	-		-		-		26,758	2	-	
Sakellarids	-		1,318,823	70	869,205	40	91,305	5	-	
Malaki	-		-		-		32,199	2	-	
Amon	-		-		-		-		-	
Karnak	-		-		-		6,703		709,044	35
Menoufi	-		-		-		-		59,509	3
Giza 23	-		-		-		-		-	
Nubari	100,747	6	23,994	1	-		-		-	
Cazulli	-		-		9,852	0.5	-		-	
Giza 7	-		-		5,532		537,720	31	-	
Joanovitch	216,982	13	2,166		-		-		-	
Others	-		-		-		-		860	
Total	317,728	19	1,344,984	71	953,207	43.5	780,833	45	769,414	38
Long Medium Staple 1 9/32" to 1 13/32"										
Wafeer	-		-		-		42,144	2	-	
Fouadi	-		-		34,242	2	-		-	
Giza 30	-		-		-		-		398,476	19
Pilion	-		-		128,982	6	-		-	
Mit Afifi and Affifi Assili	1,049,825	61	76,939	4	-		-		-	
Nahda	-		-		26,063	1	-		-	
Giza 3	-		-		37,698	2	-		-	
Abbassi	23,072	1	4,455		-		-		-	
Others	10,867	1	25,536	1	9,710	0.5	631	1/	1,560	1/
Total	1,083,764	63	106,930	5	236,695	11.5	42,775	2	400,036	19
Medium Staple, under 1 9/32"										
Zagora and Ashmouni	303,619	18	445,504	24	971,754	45	925,371	53	880,240	43
Total	303,619	18	445,504	24	971,754	45	925,371	53	880,240	43
GRAND TOTAL	1,705,111	100	1,897,418	100	2,161,656	100	1,748,978	100	2,049,691	100

1/ Less than 1 percent.

Source: Ministry of Agriculture, Egypt.

Table 3. - Egypt: Cotton production by staple length, in bales and as percentage of total crop, average 1935-39 and annual 1940-50 1/

Year and unit	Long Staple 1 13/32" and over	Long Medium 1 9/32" to 1 13/32"	Medium, less than 1 9/32"	Total crop excluding scarto
1935-39				
1,000 bales 2/..	622	48	1,184	1,855
Percent.........	33	3	64	100
1940				
1,000 bales 2/..	680	48	1,137	1,865
Percent.........	36	3	61	100
1941				
1,000 bales 2/..	619	32	1,049	1,700
Percent.........	36	2	62	100
1942				
1,000 bales 2/..	441	8	412	861
Percent.........	51	1	48	100
1943				
1,000 bales 2/..	553	3	168	724
Percent.........	76	1	23	100
1944				
1,000 bales 2/..	702	2	231	935
Percent.........	75	-	25	100
1945				
1,000 bales 2/..	778	2	279	1,059
Percent.........	74	-	26	100
1946				
1,000 bales 2/..	847	5	374	1,227
Percent.........	69	-	31	100
1947				
1,000 bales 2/..	306	29	960	1,295
Percent.........	24	2	74	100
1948				
1,000 bales 2/..	533	190	1,091	1,814
Percent.........	30	10	60	100
1949				
1,000 bales 2/..	771	161	332	1,764
Percent.........	44	9	47	100
1950				
1,000 bales 2/..	589	339	774	1,703
Percent.........	35	20	45	100

1/ Second estimate.

2/ Bales of 478 pounds of lint.

Source: Ministry of Agriculture, Egypt.

Table 4. - Egypt: Cotton acreage and production by varieties, 1944-45, 1946-47, and 1948-49 through 1950-51

Variety	1944-45	1946-47	1948-49	1949-50	1950-51 1/
	Acres	Acres	Acres	Acres	Acres
Karnak........	525,986	848,816	388,429	786,120	709,044
Giza 7........	166,939	53,110	6,451	-	-
Menoufi.......	15,342	67,206	68,792	151,065	59,509
Sakel.........	-	-	-	-	-
Maarad........	1,668	-	-	-	-
Giza 23.......	-	1,235	17,383	38,526	-
Giza 30.......	-	5,965	144,618	165,953	398,476
Malaki Amon...	8,995	1,748	872	-	-
Giza 12.......	-	-	-	-	-
Zagora........	-	278,525	376,504	23,301	98,744
Ashmouni......	164,999	-	493,115	590,336	781,496
Others........	1,474	1,231	138	1,083	2,421
Total.......	885,403	1,257,836	1,496,302	1,753,384	2,049,690
	Bales 2/	Bales 2/	Bales 2/	Bales 2/	Bales 2/
Karnak........	531,094	725,034	404,228	614,435	543,278
Giza 7........	142,014	31,718	5,192	-	-
Menoufi.......	21,463	87,392	102,875	135,339	45,584
Sakel.........	-	-	-	-	-
Maarad........	1,702	-	-	-	-
Malaki........	4,444	-	-	-	-
Sakha.........	-	-	-	-	-
Giza 12.......	-	-	-	-	-
Amon..........	1,616	1,633	648	-	-
Giza 30.......	-	5,446	190,234	161,368	339,394
Giza 23.......	-	867	16,083	20,486	-
Zagora........	-	3,011	414,805	28,420	99,456
Ashmouni......	231,416	371,174	675,346	803,645	673,400
Others........	1,572	359	449	1,117	2,072
Total.......	935,321	1,226,634	1,814,860	1,764,810	1,703,184

1/ Second estimate.

2/ Bales of 478 pounds of lint.

Source: The Egyptian Cotton Gazette.

Table 5. - Egypt: Cotton supply and distribution by crop years (August 1 to July 31) 1947-48 to 1950-51

Supply and Distribution	1947-48	1948-49	1949-50	1950-51 (preliminary)
	1,000 bales 1/	1,000 bales 1/	1,000 bales 1/	1,000 bales 1/
Supply:				
Stocks August 1.........	1,279	758	563	447
Production..............	1,294	1,808	1,763	1,702
Total supply.........	2,573	2,566	2,326	2,149
Distribution:				
Mill consumption........	215	253	217	2/ 248
Home consumption 3/.....	24	12	4/ 10	-
Exports.................	1,576	1,738	1,652	5/1,901
Carry-over..............	758	563	447	-
Total distribution...	2,573	2,566	2,326	2,149

1/ Bales of 478 pounds.

2/ Computed at current rates. Consumption through February 28, 1951 - 147,900 bales.

3/ Includes destroyed and burned.

4/ Estimated.

5/ Available for exports and stocks, of which approximately 863,000 bales had been exported up to March 1, 1951.

Source: Cotton Statistical Bulletin of Egyptian Government.

Table 6. - Egypt: Cotton exports by country of destination, prewar average, 1948-49, and 1949-50 and exports from September 1 to December 31, 1949 and 1950

Country of destination	Average 1934-35 to 1938-39 1/		1948-49 1/		1949-50 1/		September 1 to December 31			
							1949		1950	
	Percent	Bales 2/	Percent	Bales 2/	Percent	Bales 2/	Percent	Bales 2/	Percent	Bales 2/
United Kingdom	31.7	554,197	30.0	495,092	17.3	317,176	9.1	49,512	32.8	161,696
France	12.3	215,035	7.1	117,172	9.6	176,005	7.6	41,351	4.4	21,691
Germany	9.8	171,329	3.0	49,509	2.7	49,501	5.4	29,381	4.2	20,705
Italy	6.6	115,385	7.6	125,423	8.7	159,505	11.8	64,202	15.6	76,904
Switzerland	4.1	71,678	1.1	18,153	2.6	47,668	3.1	16,867	5.9	29,086
Czechoslovakia	3.4	59,441	4.4	72,614	2.4	44,001	3.0	16,323	2.6	12,817
Spain	2.4	41,958	2.0	33,007	2.0	36,668	0.4	2,176	4.5	22,184
Netherlands	0.3	5,245	2.7	44,558	3.0	55,002	4.0	21,764	5.2	25,635
Poland	2.2	38,463	-	-	0.9	16,501	1.9	10,338	0.9	4,437
U.S.S.R.	3/	3/	3/	3/	8.9	163,171	7.3	39,718	-	-
Other Europe 4/	5.2	90,909	2.6	42,908	4.3	78,836	6.7	36,454	4.7	23,170
Total, Europe	78.0	1,363,640	60.5	998,436	62.4	1,144,034	60.3	328,086	80.8	398,325
Japan	8.5	148,602	3.1	51,160	0.9	16,501	2.1	11,426	6.7	33,029
India	5/ 5.7	5/ 99,651	6/23.2	5/382,871	16.6	304,342	20.4	110,994	7.7	37,959
Pakistan	5/	5/	6/ 0.3	5/ 4,951	0.1	1,833	0.2	1,088	0.3	1,479
China	1.2	20,979	7/	7/	0.1	1,833	-	-	2.1	10,353
Total, Far East	15.4	269,232	26.6	438,982	17.7	324,509	22.7	123,508	16.8	82,820
U.S.A.	2.8	48,951	1.1	18,153	11.7	214,506	8.1	44,071	0.1	493
Canada	0.4	6,993	7/	7/	7/	7/	-	-	-	-
Total, N. America	3.2	55,944	1.1	18,153	11.7	214,506	8.1	44,071	0.1	493
All other	3.4	59,441	11.8	194,736	8/ 8.2	8/150,338	9/ 8.9	9/ 48,424	10/2.3	10/11,338
GRAND TOTAL	100.0	1,748,257	100.0	1,650,307	100.0	1,833,387	100.0	544,089	100.0	492,976

Continued---

Table 6 - continued

1/ September 1 through August 31.

2/ Bales of 478 pounds of lint.

3/ Included in "Others."

4/ Includes Belgium, Hungary, Austria, Sweden, Portugal, Estonia, and Greece for all years and U.S.S.R. for 1934-35 to 1938-39 and 1948-49.

5/ Exports to Pakistan included in India.

6/ Exports to Pakistan for 8 months (January-August 1949); exports for 4 months (September-December 1948) are included in India.

7/ Less than 1/10 of 1 percent.

8/ Includes Rumania, Bulgaria, Chile, Denmark, Finland, and Yugoslavia.

9/ Includes Rumania, Bulgaria, Denmark, Finland, and Yugoslavia.

10/ Includes Hong Kong, Rumania, Yugoslavia, Mexico, and Finland.

Source: Statistical Department of Egyptian Government.

Table 7. - Egypt: Cotton exports by variety, crop years (September 1 to August 31) 1938-1939 and 1946-1947 through 1949-1950

Variety	1938-1939		1946-1947		1947-1948		1948-1949		1949-1950	
	Percent	Bales 1/	Percent	Bales 1/	Percent	Bales 1/	Percent	Bales 1/	Percent	Bales 1/
Sakel	5.7	100,275	-	-	-	-	-	-	-	-
Karnak	-	-	49.9	719,146	37.4	604,306	31.7	523,147	44.7	819,524
Maarad	5.0	87,626	-	-	-	-	-	-	-	-
Menoufi	-	-	5.7	82,147	3.6	58,169	6.2	102,319	6.4	117,337
Sakha	.8	13,320	-	-	-	-	-	-	-	-
Giza 23	-	-	-	-	-	-	.7	11,552	.6	11,000
Giza 7	23.5	413,928	3.2	46,118	6.1	98,563	.3	4,951	.2	3,667
Giza 30	-	-	-	-	-	-	10.2	168,331	7.1	130,170
Fouadi	.5	9,337	-	-	-	-	-	-	-	-
Ashmouni	41.8	734,273	29.7	428,029	31.1	502,511	34.2	564,405	37.6	689,354
Giza 12	1.7	30,511	-	-	-	-	-	-	-	-
Zagora	19.6	344,697	5.9	85,029	16.8	271,453	16.1	265,699	2.4	44,001
Others	1.4	23,907	5.6	80,706	5.0	80,790	.6	9,902	1.0	18,334
Total	100.0	1,757,856	100.0	1,441,175	100.0	1,615,792	100.0	1,650,306	100.0	1,833,387

1/ Bales of 478 pounds.

Source: Egyptian Statistical Department.

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FC 2-51 October 15, 1951

FOREIGN MARKET NOTES--COTTON

Switzerland's Raw Cotton Supply and Distribution, 1948-49 - 1950-51 1/

By Francis H. Whitaker
Marketing Specialist

(This is a report of a study made in August 1951, of foreign market outlets for, and competition with, United States cotton, conducted under the provision of the Research and Marketing Act)

Generally speaking, the Swiss spinners have contracted their output until the end of the second Quarter of 1952, and the twisters have sufficient orders to take them to the end of the first Quarter of 1952, It was reported that the weavers were holding back due to price uncertainties and were complaining that prices were too low.

Some of the importers feel that the 1951-52 consumption will be slightly under 1950-51, but there seems little basis for this belief. If the mills keep up at their present rate, it should be higher. The offices of the Spinners Association concur in this belief.

In regard to cotton imports for 1951-52, importers expect the total to run at least 160,000 bales despite the fact that stocks on hand on August 1 were sufficient for about 6 months' consumption at last year's average rate. Some think they might run as high as in 1950-51 when about 180,000 bales were imported. During 1949-50 the total was about 155,000 bales.

However, it is generally agreed that world affairs will have a lot to do with imports of cotton. If the situation worsens, Swiss importers would stockpile as much cotton as they could, and if the peace outlook brightens they would hold their stocks at about a six month level.

1/ The author wishes to acknowledge the assistance received from the American Consulate in Zurich.

On August 15, 1951, the following cotton prices were quoted in Zurich, cost of freight to be added from Antwerp:

Kind	Cents
U. S. 1"	39.50
Turkey Acala 1-1/16"	45.00
Syrian 1"	37.50
Mexican 1"	39.00
Congo 1"	39.50
Ashmouni	70.00
Karnak	90.00
Brazilian 1"	45.00
Uganda 1-3/16"	50.00
Peruvian Tanguis	46.00

Supply and Distribution of Cotton in Switzerland

(1,000 bales of 500 pounds gross)

	Year beginning August 1		
	1948	1949	1950
SUPPLY			
Stocks August 1	91	61	75
Imports	103	155	182
Total supply	194	216	257
DISTRIBUTION			
Consumption			
Spinning	131	133	
Other	1	7	
Total consumption	132	140	168
Reexports	1	1	1/ 1
Stocks July 31	61	75	1/ 88
Total distribution	194	216	257

1/ Based on first six months consumption.
Source: American Consulate General, Zurich.

43
526

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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FC-3-51 October 22, 1951

WORLD COTTON PRODUCTION NEAR PREWAR PEAK

World cotton production in 1951-52 is tentatively estimated at 35,300,000 bales (of 500 pounds gross) from about 82.0 million acres based on preliminary reports from nearly all of the principal cotton-producing countries. This production estimate is 7.8 million bales or 28 percent higher than the slightly revised estimate of 27,540,000 bales for 1950-51, but is 9 percent below the record world crop of 39.0 million bales produced in 1937-38. Last year's world acreage is estimated at about 66.7 million acres and in 1937-38 it was 92.6 million.

This increase of 7.8 million bales in world production is attributed mainly to an increase of 6.9 million bales in the United States crop while foreign production increased by only .9 million bales. However, both the United States crop of 16.9 million bales and foreign production of 18.4 million are near the record estimates of 18.9 million and 20.0 million bales, respectively, for 1937-38.

The 69 percent increase in United States production over that in 1950-51, estimated at 10,012,000 bales, resulted from a 60-percent increase in acreage from 17,828,000 to 28,544,000 acres and an increase in average yield per acre from 269.2 pounds to 284.7 pounds as shown in the latest official cotton report released on October 8, 1951. The increase in acreage was brought about largely by the increased prices received by producers for the 1950-51 crop and was encouraged by widespread demand for a supply of cotton sufficient to make good the shortage of that year and to provide for national security and for the usual civilian needs and exports.

Cotton producers in foreign countries responded to last year's exceptionally high prices and profits with a sharp increase in acreage but in most of the countries from which reports were received, either weather conditions were unfavorable or insect infestation was greater than normal, resulting in reduced yields per acre. Maintenance of food-production programs and farm labor scarcity in some countries also were limiting factors in expansion of cotton cultivation.

Current reports from Mexico indicate that an increase of about 100 percent in cotton acreage in the State of Sonora on the west coast where new pump irrigation developments provided adequate water has nearly offset heavy losses in the Matamoros and other northeastern districts where severe drought and shortage of irrigation water existed throughout the entire growing period. This year's record estimate of 1,325,000 bales is about 300,000 above the 1950-51 crop of 1,120,000 bales but about 200,000 less than was expected earlier from the larger acreage.

COTTON: Acreage and production in specified areas, averages 1935-39 and 1940-44, annual 1949-51 1/

Continent and country	Acreage					Production 2/				
	Year beginning August 1					Year beginning August 1				
	Averages					Averages				
	1935-39	1940-44	1949	1950 3/	1951 3/	1935-39	1940-44	1949	1950 3/	1951 3/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
NORTH AMERICA										
El Salvador	9	23	43	52	78	5	12	30	27	40
Guatemala	-	7	8	9	-	2	3	5	7	-
Mexico	725	855	1,446	1,804	2,015	334	425	937	1,120	1,325
Nicaragua	9	7	37	48	70	5	5	21	20	40
United States	27,788	21,992	27,230	17,828	28,544	13,149	11,957	16,128	10,012	16,931
British West Indies	20	20	15	-	-	5	5	4	-	-
Haiti	-	-	40	25	-	22	12	8	4	-
Total 4/	28,642	22,960	28,824	19,792	30,791	13,523	12,421	17,136	11,198	18,365
EUROPE										
Bulgaria 5/	85	61	-	-	-	35	17	-	-	-
Greece	168	101	141	191	212	76	27	72	117	126
Italy	56	106	43	57	42	21	27	9	14	13
Rumania 5/	8	63	-	-	-	2	11	-	-	-
Spain	46	96	135	-	-	10	17	14	15	-
Yugoslavia	8	15	104	-	-	3	4	8	-	-
Total 4/	372	443	634	722	794	147	103	153	203	236
U.S.S.R. (Europe and Asia)	5,087	3,911	4,550	5,600	-	3,430	2,080	2,700	-	-
ASIA										
Cyprus	11	6	6	13	-	3	1	2	3	-
Iran	453	384	247	300	-	171	105	96	129	124
Iraq	53	73	24	100	125	11	10	9	38	38
Syria	85	48	99	193	550	28	15	61	140	300
Turkey	667	736	804	1,100	1,500	249	241	445	562	650
Afghanistan	-	-	-	-	-	49	23	20	34	-
Burma	428	364	184	203	216	97	80	35	35	40
China (incl. Manchuria)	7,038	5,849	5,300	7,650	-	2,855	2,012	1,700	2,330	-
French Indochina	36	-	-	-	-	6	7	1	1	-
Japan	2	-	12	-	-	1	1	3	-	-
India	6/ 24,204	6/ 20,518	12,173	13,859	15,900	6/ 5,348	6/ 4,853	2,350	2,650	2,800
Korea 7/	564	776	330	-	-	198	196	130	90	-
Indonesia	27	24	-	-	-	9	10	5	3	-
Pakistan	6/	6/	2,362	2,800	2,900	6/	6/	1,000	1,237	1,286
Philippine Islands	5	15	3	3	3	1	3	1	1	1
Siam	16	80	82	86	-	7	29	20	23	-
Total 4/	33,805	29,100	22,291	26,759	30,152	9,038	7,593	5,883	7,287	7,920

SOUTH AMERICA										
Argentina	770	826	1,141	1,142	1,300	289	398	643	460	500
Brazil	5,562	5,812	4,500	4,700	-	1,956	2,169	1,300	1,500	1,350
Colombia	98	99	-	120	-	23	22	38	33	-
Ecuador	40	38	-	-	-	13	9	18	18	18
Paraguay	111	116	161	150	-	40	42	60	49	-
Peru	428	353	380	385	383	379	311	371	372	370
Venezuela	50	53	-	-	35	11	15	6	5	-
Total 4/	7,060	7,299	6,415	6,580	6,876	2,711	2,966	2,437	2,438	2,349
AFRICA AND OCEANIA										
Anglo-Egyptian Sudan	439	363	430	539	-	248	253	305	436	-
Belgian Congo	874	923	750	800	-	172	182	220	197	-
Kenya	-	-	50	58	60	13	21	8	11	10
Nyasaland	84	56	-	-	-	12	7	5	4	5
Tanganyika	-	-	-	-	-	50	45	43	41	47
Uganda	1,477	1,152	1,629	1,550	1,550	281	198	283	283	275
Canary Islands	-	-	2	5	-	-	-	1	2	-
Egypt	1,821	1,162	1,756	2,050	2,054	1,393	1,243	1,796	1,754	1,697
French Equatorial Africa	390	583	600	600	-	41	87	120	100	-
French North Africa	1	5	5	12	17	8/	2	3	5	7
French West Africa	-	-	-	-	-	28	20	22	25	-
Mozambique	-	497	644	-	- 9/	33	93	83	120	-
Nigeria	-	-	-	-	-	36	30	60	80	80
Angola	73	-	102	110	-	13	24	28	30	30
Southern Rhodesia	2	5	10	-	-	8/	1	4	4	-
Union of South Africa	-	-	32	40	-	2	1	6	11	20
Australia	53	35	3	6	8	11	7	1	1	2
Total 4/	6,176	5,642	6,686	7,287	7,367	2,840	2,219	2,991	3,114	3,030
World total 4/	81,142	69,355	69,400	66,740	81,980	31,689	27,382	31,300	27,540	35,300

1/ Production in bales of 478 pounds net prior to 1946 and 480 pounds thereafter. 2/ Years shown refer to crop years in which major portion of crop was harvested. 3/ Preliminary. 4/ Includes estimates for minor-producing countries not listed above, and allowances for other figures not available. 5/ Figures for 1943 to date are not comparable with prewar figures because of boundary changes. 6/ Pakistan included with India. 7/ South Korea only, after 1941. 8/ Less than 500. 9/ Exports.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics, reports of United States Foreign Service officers and results of office research.

The 1951-52 crop now being harvested in North Brazil is estimated at less than 300,000 bales compared with 480,000 a year ago. The decrease is attributed to heavy damage by locust plagues and to a lesser extent to drought. There is little evidence of any significant increase in South Brazil where the 1951-52 crop is planted during September and October so the over-all estimate for Brazil is calculated at 1,350,000 bales compared with 1,500,000 a year ago. The principal limiting factors for cotton expansion in South Brazil are scarcity of farm labor, the difficulty of competing with high-profit coffee crops, scarcity of fertilizers, and lack of access to new large areas of virgin farm land which made possible the rapid expansion of cotton growing in the 1930's.

Early reports of sharp increases in cotton acreage and production in Turkey and Syria have been revised downward because of heavy insect damage, unfavorable weather, and lack of experience in proper cultivation and insect control on the part of many farmers. However, the current estimates of 650,000 bales for Turkey and 300,000 bales for Syria in 1951-52 represent new records for those countries.

In India the 1951-52 crop of around 2,800,000 bales will fall far short of the government's goal of 3,200,000 bales but may be about 150,000 above the 1950-51 estimate. Failure of the monsoon in northern India is reported to be the principal reason for the downward revision in earlier estimates although the government's food-production program still retains its high-priority status in the national economy.

A small increase from 1,237,000 bales to 1,286,000 was reported in Pakistan where new irrigation projects are under construction. Failure of the monsoon was also felt in southern parts of the country where cotton yields are lower than previously expected.

The Egyptian crop, estimated officially at 1,697,000 equivalent bales of 500 pounds, is slightly less than the 1950-51 crop of 1,754,000 bales which was handicapped by heavy insect infestation and very high temperatures. The 1951-52 acreage estimate of 2,054,000 acres is 4,000 higher than that of a year ago. Private estimates of the current crop range from 1.9 million to 2.2 million bales and no serious damage by insects was reported earlier in the season.

There are no significant changes in production in other foreign countries from the 1950-51 level except possibly in China where the Communist press indicates large increases in acreage and production despite earlier reports of drought at planting time, widespread flood damage in July, and heavy insect infestation. The 1950-51 crop was estimated by unofficial observers at 2,330,000 bales. A tentative estimate of 2.5 million bales for the current crop has been used in this report although there are indications that the estimate may have to be revised upward when more detailed information becomes available.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. It is based in part upon U.S. Foreign Service reports.

43
626

FOREIGN AGRICULTURE CIRCULAR

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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FC-4-51 October 29, 1951

WORLD COTTON STOCKS AT LOWEST POSTWAR LEVEL

World cotton stocks on July 31, 1951, estimated at 11.0 million bales (of 500 pounds gross weight except U.S. stocks which are in running bales), are 40 percent less than the 16.6 million now estimated to have been in store on July 31, 1950. The 1951 stock figure is only one-third of world consumption in 1950-51 and may be considered a minimum working stock since July 31 is midseason in the Southern Hemisphere producing countries where stocks (including unginned cotton) are always heavy at that time of the year.

It is significant that stocks in the surplus-producing countries on July 31, 1951, were only half as large as those of a year earlier, estimated at 10.4 million bales, while stocks in the nonproducing and deficit-producing countries were down by only 2.8 percent or less than 200,000 bales to 5.5 million. The amount of cotton afloat or in transit in international trade at the end of July 1951 is also estimated to have been down from around 530,000 to about 300,000 bales, as old-crop cotton was relatively scarce late in the season and importers awaited the arrival of lower priced new-crop supplies after August.

Stocks in the nonproducing and deficit-producing countries, although only slightly lower than a year ago, were unevenly distributed. Moderate increases took place in some countries while others reported stocks below the level needed for efficient mill operation. The 1951 stocks of 5.5 million bales in this group of countries as a whole represented only 32 percent of their 1950-51 consumption totaling 17.1 million bales. The only major importing countries with stocks in 1951 above 4 months' current mill requirements were the United Kingdom, Italy, India, Japan, and Switzerland.

Stocks in the surplus-producing countries on July 31, 1951, estimated at 5.2 million bales, represented 33 percent of 1950-51 consumption of 15.7 million bales. However, high midseason stocks in Southern Hemisphere countries where consumption is low or nonexistent amounted to 1.5 million bales or about 1 year's mill requirements. In the remaining surplus countries the 1951 stocks totaling 3.7 million bales amounted to 26 percent of 1950-51 consumption of 14.2 million. Some rebuilding of stocks during the current season is to be expected in exporting countries as well as in importing countries.

COTTON: Estimated world stocks by principal countries, July 31, 1951, with comparisons 1/

(In bales of 500 pounds gross)

Country	Stocks on hand July 31			
	1939	1949	1950	1951
	1,000 bales	1,000 bales	1,000 bales	1,000 bales
Surplus countries				
Mexico	150	226	200	130
United States 2/	13,033	5,287	6,846	2,179
Haiti	5	-	3	-
Iran	40	24	32	9
Pakistan	-	153	133	167
Turkey	70	61	80	68
Argentina	243	481	665	400
Brazil	661	698	530	445
Paraguay	11	29	36	18
Peru	200	108	155	160
Anglo-Egyptian Sudan	107	95	75	161
Belgian Congo	150	149	125	97
British East Africa	75	146	113	118
Egypt	325	575	489	409
French Equatorial Africa	15	60	72	52
Others 3/	1,050	830	818	792
Total surplus countries	16,135	8,922	10,372	5,205
Deficit countries				
Canada	56	51	61	69
Cuba	10	3	4	4
Belgium	150	95	150	114
Czechoslovakia	100	68	68	68
France	700	318	495	313
Western Germany	4/	117	293	133
Italy	250	344	395	445
Netherlands	80	51	98	72
Spain	50	52	45	61
Sweden	60	69	57	51
Switzerland	100	60	75	88
United Kingdom	1,045	1,639	1,403	1,228
China, incl. Manchuria 5/	900	400	300	200
India 5/6/	2,165	1,543	1,380	1,520
Japan	556	405	300	625
Korea 5/	43	37	17	18
Colombia	5	59	68	47
Australia	20	22	21	33
Others 7/	775	492	468	448
Total deficit countries	7,065	5,825	5,698	5,537
Afloat 8/	550	284	530	283
World total	23,750	15,031	16,600	11,025

1/ Estimates for Southern Hemisphere countries include unginned cotton on hand at the end of July. 2/ Running bales. 3/ Mostly U.S.S.R., Mozambique, and Nigeria. 4/ Included with "Others." 5/ Includes estimates for noncommercial stocks. 6/ Includes Pakistan prior to partition in August 1947. 7/ Mostly countries in Europe and South America. 8/ Estimated.

Depletion of stocks in surplus-producing countries while those in other countries were generally maintained slightly below last year's level is attributed to the short world supply in 1950-51 and the consequent rise in prices with consumption at a record level. Exporting countries generally were willing to deplete their reserve stocks to minimum levels either to take advantage of unusually favorable prices or to afford relief to other countries where available supplies were inadequate. On the other hand, importing countries attempted to maintain satisfactory stocks throughout the 1950-51 season because of earlier uncertainty regarding the 1951-52 world cotton crop and unsettled world political conditions.

Although world production in 1951-52 is expected to reach 35.3 million bales and consumption expected to be less than the 32.8 million bales consumed in 1950-51 it appears that the world stocks will still be well below normal at the end of the current season.

This is one of a series of regularly scheduled reports on world agricultural developments approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. It is based in part upon U.S. Foreign Service reports.

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743
26

FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FC-5-51 October 29, 1951

WORLD COTTON TRADE IN 1950-51 DOWN BY 4.6 PERCENT

World cotton exports of 12.0 million bales (of 500 pounds gross) in 1950-51 were 4.6 percent lower than in 1949-50 when 12.6 million bales were exported. The decrease is attributed to a world shortage of available supplies and resulting high prices rather than to a lack of effective demand for imports. A rise of 1,150,000 bales in exports from foreign countries to 7,743,000 bales was more than offset by a decrease of 1,724,000 bales in exports from the United States to 4,280,000 bales. Export restrictions, intended to conserve sufficient stocks for their own mills, were in effect in at least 7 countries during all or a part of the past season and are still in effect in India and Argentina and in Brazil in moderate form.

In 1950-51 the cotton-importing countries of the world were able to satisfy most of their mill requirements at a record level of consumption as indicated by stock data (see Foreign Agriculture Circular, FC-4-51, "World Cotton Stocks at Lowest Postwar Level"), showing only a small net reduction in stocks for this group of countries as a whole. World trade remained relatively high despite the short supply in the United States and the 100- to 125-percent increase in prices of foreign growths as foreign mills made an effort to meet increased demand and to build inventories of cotton and cotton goods during a period of rapidly rising prices.

A net result of last year's high level of trade at a time when world production was 5.4 million bales (running) below world consumption is that stocks in the exporting countries as a group are only half as large as a year ago, having been decreased by 5.2 million bales. The United States accounted for 4.7 million bales of the decrease and other exporting countries about 0.5 million. Since the production increase in foreign-exporting countries this year is estimated at only 450,000 bales and stocks are generally depleted, it is apparent that the supplies available for export from foreign-producing countries in 1951-52 will be little if any larger than in 1950-51 even if stocks are allowed to remain at the low level reported for July 31, 1951.

With a build-up of stocks needed in about half of the importing countries and world cotton prices reduced to the 1949-50 level it appears that under present conditions world export trade in cotton could exceed the total of 12 million bales exported in 1950-51 and might exceed the

COTTON: World exports by countries of origin, 1944-1950

(Equivalent bales of 500 pounds gross weight)

Country	Year beginning August 1						
	1944	1945	1946	1947	1948	1949	1950 1/
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
NORTH AMERICA							
Mexico	125	263	204	359	232	655	860
United States	1,909	3,678	3,656	2,025	4,961	6,004	4,230
Others	13	30	12	29	29	38	46
Total	2,047	3,971	3,872	2,413	5,222	6,697	5,186
ASIA							
China	40	0	2/	0	0	0	3/ 50
India	317	848	828	704	262	214	153
Pakistan 4/	-	-	-	5/ 980	677	892	1,065
Iran	2/	0	8	6	16	29	106
Iraq 6/	3	1	1	10	2	7/ 6	7/ 31
Turkey	34	2/	1	5	129	209	364
Syria	0	0	0	1	5	33	111
Others 8/	75	49	22	31	44	23	58
Total	469	898	860	1,737	1,135	1,406	1,938
SOUTH AMERICA							
Argentina	43	125	36	0	28	49	276
Brazil	461	1,462	1,517	1,049	955	598	690
Paraguay	6/ 30	71	38	33	27	48	55
Peru	164	433	331	263	217	264	300
Others	0	0	0	0	0	0	2
Total	698	2,091	1,922	1,345	1,227	959	1,323
AFRICA							
Anglo-Egyptian Sudan	330	280	249	255	325	325	350
Angola	6/ 26	30	23	22	12	27	30
Belgian Congo 6/	138	171	217	200	235	7/ 217	7/ 192
British East Africa	6/ 195	6/ 269	6/ 212	235	336	372	333
Egypt	804	862	1,482	1,577	1,692	1,640	1,532
French Equatorial Africa	6/ 77	85	86	127	110	6/ 108	120
French West Africa 6/	14	11	8	3	4	11	12
Mozambique	6/ 110	129	80	130	103	120	112
Nigeria	20	15	31	29	36	60	75
Others	2	2	2	2	2	6	13
Total	1,716	1,854	2,390	2,580	2,855	2,886	2,769
Other Countries 9/	0	400	450	675	600	650	807
World total	4,930	9,214	9,494	8,750	11,039	12,598	12,023

1/ Preliminary. 2/ Less than 500 bales. 3/ Based on Chinese press reports of "large shipments" to the Soviet Union. 4/ Reported separately for the first time for 1947-48. 5/ Includes about 230,000 bales of exports from Pakistan to India. In earlier years this movement was internal trade. To this extent Asia and world totals in 1947-48 are not comparable with earlier years. 6/ Calendar years. 7/ Crop year. 8/ Mostly Burma. 9/ Mostly U.S.S.R.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, reports of U.S. Foreign Service officers, results of office research, and other information.

1949-50 total of 12.6 million. The principal obstacle to a sizable increase in trade this year is the fact that most of the increase will have to come from the United States, necessitating a much larger outlay of dollar exchange on the part of many countries which still find it necessary to conserve their dollar resources.--By Charles H. Barber, based in part upon U.S. Foreign Service reports.

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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FC-6-51 November 7, 1951

FOREIGN MARKET NOTES--COTTON

Italy's Cotton Supply Situation for the Crop Year - August 1, 1950 to July 31, 1951, Reported August 30, 1951 1/

(Based on a recent report by Francis H. Whitaker, Marketing Specialist, of a study of foreign market outlets and competition with United States cotton, conducted under the provision of the Research and Marketing Act.)

Cotton consumption in Italy during the 1950-51 cotton season is estimated at 982,000 bales (of 500 pounds gross weight). This is the highest total for any year since 1929-30 when slightly over 1,000,000 bales were consumed by mills in Italy. It also represents an increase over the 933,000 bales consumed in 1949-50, 951,000 in 1948-49, and 711,000 for the 1938-39 prewar season.

About 60 percent of the cotton consumed in 1950-51 is estimated to have been United States cotton compared with 77 percent in 1949-50 when United States cotton was available in unlimited quantities. For other recent years United States cotton represented the following percentages of total consumption: in 1948-49 about 54 percent; in 1947-48 about 40 percent; in 1946-47 about 53 percent and during the 10 years preceding the second World War, an annual average of 64 percent. The next largest supplier has been Egypt. During the past season, Egypt was the source for about 17 percent of Italian cotton imports. Other sources of supply in order of importance were India and Pakistan, Argentina, Mexico and Brazil.

1/ Mr. Whitaker acknowledges assistance in making the study received from the American Consul, Joseph A. Wiedemayer, Milan, Italy; Robert C. Tetro, Agricultural Attache, American Embassy, Rome, Italy; Instituto Cotoneiro Italiano, and the Associazione Cotoniero Italiana, Milan, Italy. The statistics presented by the author have been accepted by the author as reliable.

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Although stocks of raw cotton on hand August 1, 1951 were only about 13 percent higher than those of a year ago, some mills are reported to be holding large stocks of cotton yarns and cloth. The Italian authorities have suggested to such mills that they improve their financial status by selling some their goods. Both domestic and export sales of cotton goods are reported to have slowed down during the summer months. However, exports are still relatively high. The monthly average of total exports of cotton yarns and cotton goods were 5,891 metric tons for the first five months of 1951. This compares with 6,005 metric tons for 1950, 5,380 for 1949, 4,466 for 1948, and 5,496 for 1938.

There is some concern among cotton buyers regarding their ability to secure all the cotton they need in the coming months due to the shortage of dollar exchange. The cotton trade estimates import requirements for the coming year at about 1.0 million bales, of which about 69 percent is needed from the United States, 16 percent from Egypt, and 7 percent from India and Pakistan, with most of the balance coming from Mexico and South American countries.

The domestic production of cotton in Italy since the last war has averaged about 11,000 bales. During the war it averaged around 27,000 bales, and the average for the five years prior to the war was about 21,000 bales. Cotton production in Italy is not considered economical since the land can be used more advantageously to producing crops for which several crops can be grown in one year. However, there is some feeling that cotton could be grown to advantage if technical assistance were given to the farmers to help them improve cultural and growing practices, and if proper ginning facilities were available. Some believe that from 50 to 100 thousand bales could be grown each year.

In the Italian Somaliland, cotton growing during the war was practically discontinued in order to produce much-needed food crops. However, as in Italy, it is thought that cotton production could be increased materially, possibly to 15 or 20 thousand bales, through technical assistance and irrigation.

During the war years (1941-44) cotton made up only about 16 percent of the raw materials processed by spinning mills of Italy. During 1945 cotton was 73 percent of the total, 1946, 94 percent, in 1947, 95 percent, and in 1948, 93 percent. In 1949 it fell to 84 percent due to the unfavorable price relationship of cotton to artificial fibers which was further augmented by the devaluation of the lire. During the 1950-51 season, due to limited cotton supplies, cotton prices rose to record levels, and as a result only 81 percent of the raw materials were composed of cotton. With the increase in available supplies of cotton in 1951-52, and with sufficient dollar exchange, the percentage could be expected to go to around 90.

At the end of the calendar year 1950, there were 5,623,000 spindles in place. There were 5,474,000 at the end of 1938. Through the years there has been a gradual increase in the numbers. During the first five months of 1951, the number of spindles increased 78,000 and averaged 91.3 percent active. During 1950 the monthly average activity was 91.1 percent. During the past 20 years the number of looms have changed very little, but activity has increased and they are being modernized, thereby giving more production per loom. The monthly average loom activity during 1950 was 87.9 percent. The compares with a monthly average of 89.3 percent for the first five months of 1951. Of the spindles in place at the end of 1950, 97.9 percent were of the ring type. Of the looms, 34.1 percent were automatic, 28.8 percent semi-automatic, 36.8 percent of ordinary type, and the small balance hand-operated. Ring spindles increased about 64,000 over the preceeding year and automatic looms increased about 1,843 and semi-automatic looms increased about 440. At the end of 1950, there were 140 mills that do only spinning, and 72 mills which do both spinning and weaving, and 859 mills which do only weaving.

The total rayon yarn and staple fiber production in Italy during the calendar year 1950 was equivalent to about 534,000 bales of cotton which was 58 percent of the peak 1941 production of 921,000 equivalent bales. It was about 20 percent larger than produced in 1949 and about 57 percent higher than the 1948 production. During the past several years the Italian artificial fiber producers have been striving to tie the textile mills up with contracts for future deliveries. They have been especially active during the past 12 months since the scarcity of both cotton and wool increased the demand for substitutes to take the natural fibers' place. It was reported they made a special effort to prevail upon the cotton textile mills to sign contracts to purchase artificial fibers equivalent to about 125,000 bales of cotton. This would have been in addition to what they were already receiving. The effort was not very successful, however, since the clientele of the cotton mills prefer natural cotton to cotton fiber substitutes. The consuming public remembers the artificial fiber material it used during the last war and prefers cotton.

Table 1: Percentage of total cotton consumed in Italy which came from the U. S. for crop years (beginning August 1) shown 1/

Crop Year	Percent	Year	Percent
1927	74.9	1937	60.3
1928	71.5	1938	50.8
1929	67.4	1929-38 average	64.1
1930	62.2	1944	37.7
1931	71.4	1945	44.5
1932	79.2	1946	52.7
1933	73.2	1947	39.6
1934	56.5	1948	54.3
1935	68.2	1949	76.6
1936	51.7	1950	60.0

1/ Information not available for war years, 1939 through 1943.

Source: Istituto Cotoniero Italiano, Milano, Italy.

Table 2: Consumption and imports of cotton from major countries of origin
(In bales of 500 pounds gross weight)

Crop year beginning August 1	Consumption	Imports 1/				
		United States	India and Pakistan	Egypt	All others	Total 2/
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
1925..........	-	728	258	84	20	1,090
1926..........	-	791	210	77	26	1,104
1927.........	968	739	130	79	15	963
1928..........	1,036	779	183	93	17	1,072
1929..........	1,010	767	222	111	26	1,126
1930..........	796	613	221	86	23	943
1931..........	822	483	168	99	36	786
1932..........	902	676	67	106	28	877
1933..........	905	761	121	118	12	1,012
1934..........	814	403	150	143	36	732
1935..........	623	401	122	134	29	686
1936..........	619	488	66	130	69	753
1937..........	700	485	71	120	100	776
1938..........	711	303	51	105	115	574
1939..........	602	410	35	109	110	664
1940..........	208	40	2	2	10	54
1941..........	54	8	3/	3/	16	24
1942..........	71	1	4/	4/	7	8
1943..........	14	0	0	0	7	7
1944..........	9	0	0	0	2	2
1945..........	337	292	0	80	120	492
1946..........	857	572	18	237	298	1,125
1947..........	829	226	92	199	121	638
1948..........	951	602	59	160	157	978
1949..........	933	764	34	117	60	975
1950 5/.......	982	600	80	170	168	1,018

1/ Prior to 1934 data are for calendar years.
2/ Excludes re-exports.
3/ Less than 500 bales.
4/ If any, included in all others.
However, it is thought most of it came from the United States.
5/ Preliminary.

Table 3: Italian exports of cotton goods - monthly average

Calendar Years	Yarns	Cloth and Mfg. goods	Total
	Metric tons	Metric tons	Metric tons
1938	1,614	3,882	5,496
1947	1,442	1,120	2,562
1948	2,884	1,582	4,466
1949	2,961	2,419	5,380
1950	2,361	3,644	6,005
1951 1/	2,332	3,559	5,891

1/ January through May.

Source: Istituto Cotoniero Italiano, Milano, Italy.

Table 4: Raw materials put into process by spinning mills from 1939 to 1950

Calendar Years	Cotton	Staple Rayon	Other textile fibers	Waste	Total
	Percent	Percent	Percent	Percent	Percent
1939	62.5	28.0	3.9	5.6	100
1940	53.7	34.1	4.8	7.4	100
1941	20.6	69.7	3.6	6.1	100
1942	16.5	72.4	5.5	5.6	100
1943	20.9	63.0	8.1	8.0	100
1944	7.8	72.6	10.4	9.2	100
1945	72.7	11.7	4.7	10.9	100
1946	94.1	3.7	0.6	1.6	100
1947	95.4	3.9	-	0.7	100
1948	93.4	4.8	-	1.8	100
1949	84.1	9.4	0.3	6.2	100
1950	81.0	11.6	0.1	7.3	100

Source: Istituto Cotoniero Italiano, Milano, Italy.

Table 5: Cotton spindles and looms in place at the end of each year shown

Calendar Years	Spinning spindles	Looms
	Thousands	Thousands
1900	2,111	70
1903	2,933	78
1908	3,969	90
1912	4,582	115
1921	4.514	122
1925	4,754	139
1930	5,450	150
1938	5,474	136
1946	5,251	138
1950	5,623	142
1951 (May)	5,701	142

Source: Instituto Cotoniero Italiano, Milano, Italy.

Table 6: Supply and distribution of cotton in Italy by crop years (August 1 - July 31) for years 1944-45 through 1949-50 (1,000 bales of 500 pounds gross weight)

	Year beginning August 1							
	1944-5	1945-6	1946-7	1947-8	1948-9	1949-50	1950-1 1/	1951-2
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
Supply								
Stocks Aug. 1	35	37	201	481	305	344	395	445 2/
Imports	2	492	1,125	638	978	975	1,018	1,000 2/
Production	9	9	12	15	12	9	14	13 1/
Total	46	538	1,338	1,132	1,295	1,328	1,427	1,458
Distribution								
Consumption	9	337	857	829	951	933	982	
Stocks July 31	37	201	481	305	344	395	445	
Total	46	538	1,338	1,134	1,295	1,328	1,427	

1/ Preliminary data.
2/ Trade estimates of needs.

Source: Istituto Contoniero Italiano, and the Associazione Contoniero Italiano, Milano, Italy. Trade Estimates with minor adjustments.

Table 7: Rayon yarn and staple fiber production 1/ in Italy
(1,000 bales of 425 pounds)

Calendar Years	1,000 bales	Year	1,000 bales
1935	361	1943	531
1936	461	1944	159
1937	619	1945	17
1938	631	1946	223
1939	717	1947	354
1940	844	1948	340
1941	921	1949	447
1942	743	1950	534

1/ Includes filament yarn and staple, coverted to equivalent bales of cotton at the rate of 425 pounds of rayon to 1 bale of 500-pound gross weight cotton. It is not intended to infer that every bale of rayon comes into direct competition with cotton. When sufficient quantities of both fibers are available, along with ample currency exchange for their purchase, the various fibers normally fall into preferred uses.